

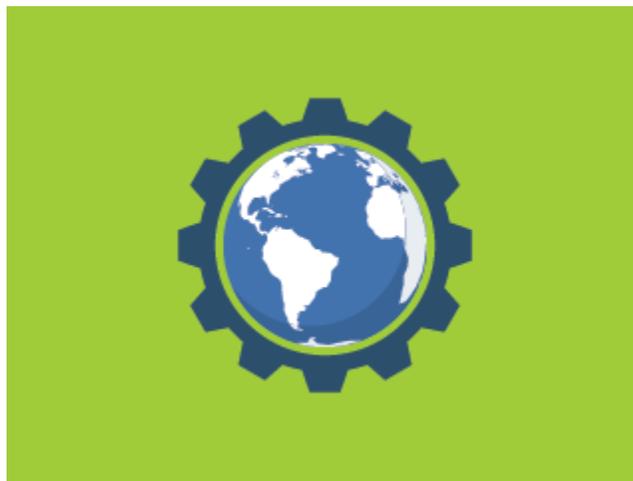


Welcome to Merriman
empowering you to **LIVE FULLY**
by providing peace of mind
throughout your financial life.



Who we are

Merriman was founded in 1983 as a fee-only investment advisory firm with a strong focus on excellent service, smart investing and long-term goals. We've grown significantly since then, and have also come to realize that investment advice is only a small piece of the puzzle.



Our process

To help our clients be truly successful in achieving their goals, we offer a comprehensive approach to wealth management that includes not only investment planning, but also encompasses taxes, estate planning, insurance, risk management, charitable giving and more.



How we think about investing

Investing is a sort of science. Our investment philosophy is grounded on decades of academic research, and relies on objective data rather than emotions and forecasts. Above all, we seek to balance return and risk considerations over longer-term time horizons.

Wealth Preservation

What is a CDFA®?

Divorce is stressful and impacts the financial futures of those involved. Find out how a CDFA® can help alleviate the financial stressors in this article.

[read more](#)

Wealth Enhancement

How to report a backdoor Roth IRA contribution on your taxes

Backdoor Roth IRA contributions are great tools for high earners to take advantage of Roth IRAs even after passing the income limits for standard contributions, and the steps for making backdoor Roth IRA contributions are pretty simple.

[read more](#)

Wealth Protection

Restricted Stock Units (RSUs)

What are Restricted Stock Units (RSUs)?
[read more](#)

Wealth Transfer

When Your Will Isn't Enough

End of life matters aren't something we generally want to discuss, but doing so can greatly ease the stress of your loved ones during a difficult time. Use this checklist to state your intentions!
[read more](#)

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Merriman | 800 5th Avenue | Suite 2900 | Seattle, WA 98104

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206.285.8877 | 800.423.4893